

NATIONAL RESTAURANT ASSOCIATION OF INDIA

Snapshot: Indian Restaurant Industry



About NRAI



- **National Restaurant Association of India** (NRAI) is the Voice of the Indian Restaurant Industry. Founded in 1982, it represents 100000+ restaurants, an industry valued INR 3,09,110 crores.
- Being the leading association of the Indian restaurant industry, NRAI aspires to promote and strengthen the Indian Food Service Sector. Headquartered in Delhi, the association in its 35th year has a pan India presence with members comprising of restaurants, suppliers and others associated with the industry.
- NRAI is governed by a committee of members and led by a President and Office Bearers. The committee consists of 35 Restaurant CEOs / Owners representing various national and international brands from the F & B sector. The association works closely with a network of State and City chapters.



Vision

- NRAI aspires to lead the Indian Restaurant Industry to greater profitable growth representing interests of members through advocacy, training, research and industry events.

NRAI aims to :

- Advocate changes in the laws governing the Indian Restaurant Industry at Local, State and Centre levels.
- Provide opportunities to educate members.
- Play a key role in promoting skilling and career opportunities for industry professionals through the Hospitality Sector Skill Council.

Food Services : ~ INR 3 Lakh Crores in 2016



- Food Services, currently at ~ INR 3 Lakh Crores, is projected to grow at 10% CAGR to ~ INR 5 Lakh Crores in 2021.
- It contributes over 2.1% to the G.D.P. of India.

	2013	2016	2021 (P)
INR '000 Crores	247	309 7.7%	498 10%
USD Constant (Bn): \$1 = ₹52	48	60	97
USD Current (Bn): \$1 = ₹65	38	48	77

1.6x Indian
Railways

8x Hotels

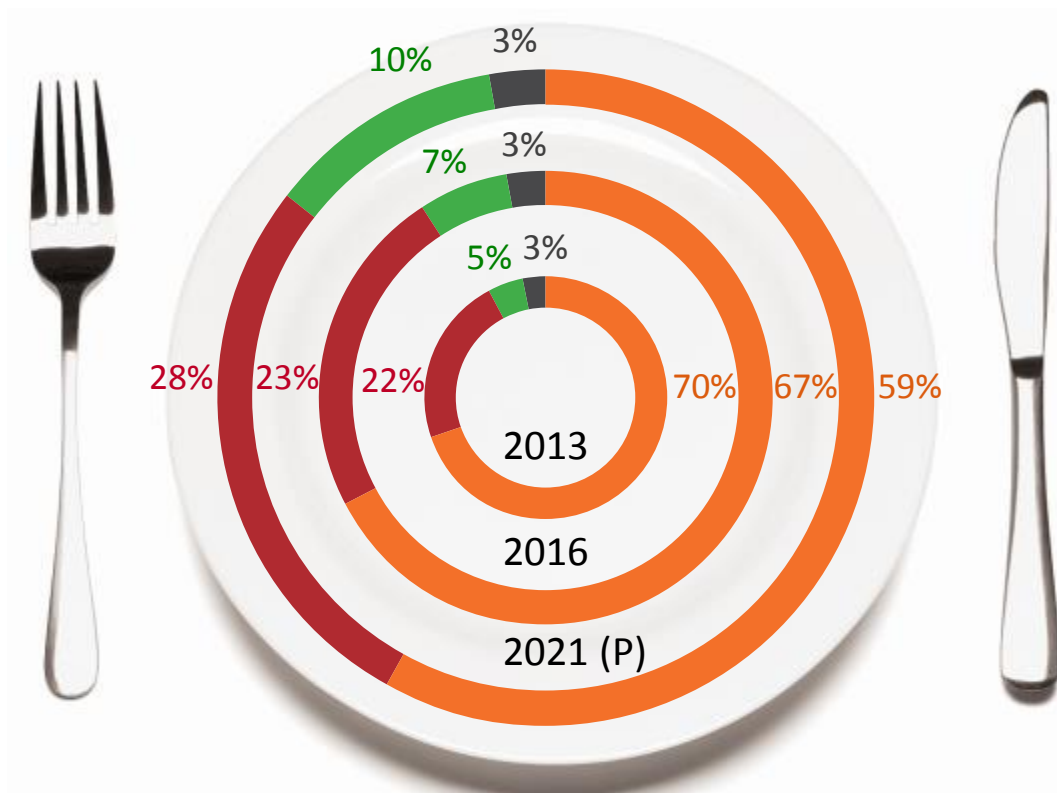
23x Bollywood

Source: [NRAI India Food Services Report 2016](#)

Organized Market One Third of the Total



- Organized Market's current share of 33% projected to grow to 41% by 2021. Chain Market growing the fastest at 20%



INR '000 Crores










Market Segment	2013	2016	2021 (P)
Unorganized Market	172	207	293
Organized Standalone	55	72	139
Chain Market	12	20	50
Restaurants in Hotels	7	8	13

Source: [NRAI India Food Services Report 2016](#)

Casual Dine Restaurants have the largest share



- Casual Dine Restaurants have the largest share (54%), followed by QSRs (20%) in the organized segment.

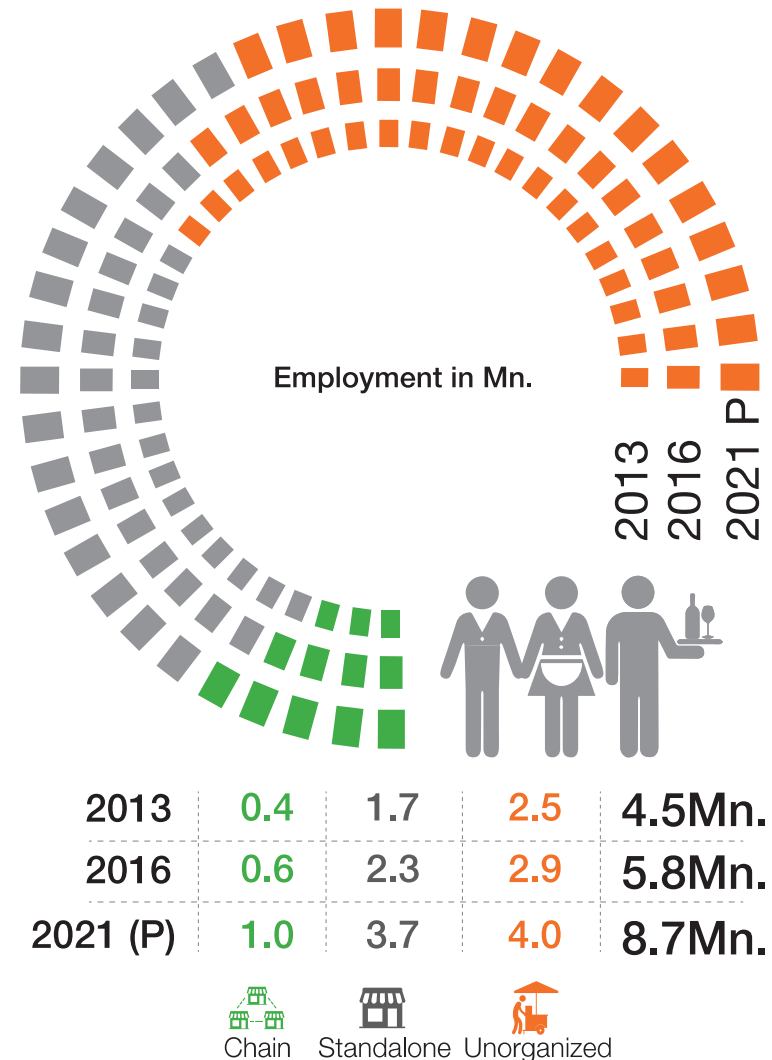
Formats	 Chain Market Size 2016 (INR Cr.)	 Organized Standalone Market 2016 (INR Cr.)
 Quick Service Restaurants	9,125	9,290
 Affordable Casual Dining Restaurants	5,110	36,820
 Premium Casual Dining Restaurants	1,610	6,790
 Cafe	1,805	5,370
 Frozen Desserts/ Ice Cream	1,155	1,690
 Pubs, Bar Cafes & Lounges	1,065	10,480
 Fine Dining Restaurants	530	1,815
Total	20,400	72,255

Source: [NRAI India Food Services Report 2016](#)

Employing ~ 14 Mn Indians



- The industry currently generates a direct employment of **5.5 - 6 million people**, projected to grow to **8.5 - 9 million** by 2021
- The industry employs another **7.5 – 8.5 million** in-directly, and is projected to grow to **9.5 – 10.5 million** by 2021
- Offers employment opportunities at all levels, across socio-economic segments
- Entrepreneurial, self employing
- A mix of education levels and skill sets, offers opportunity to upgrade and grow

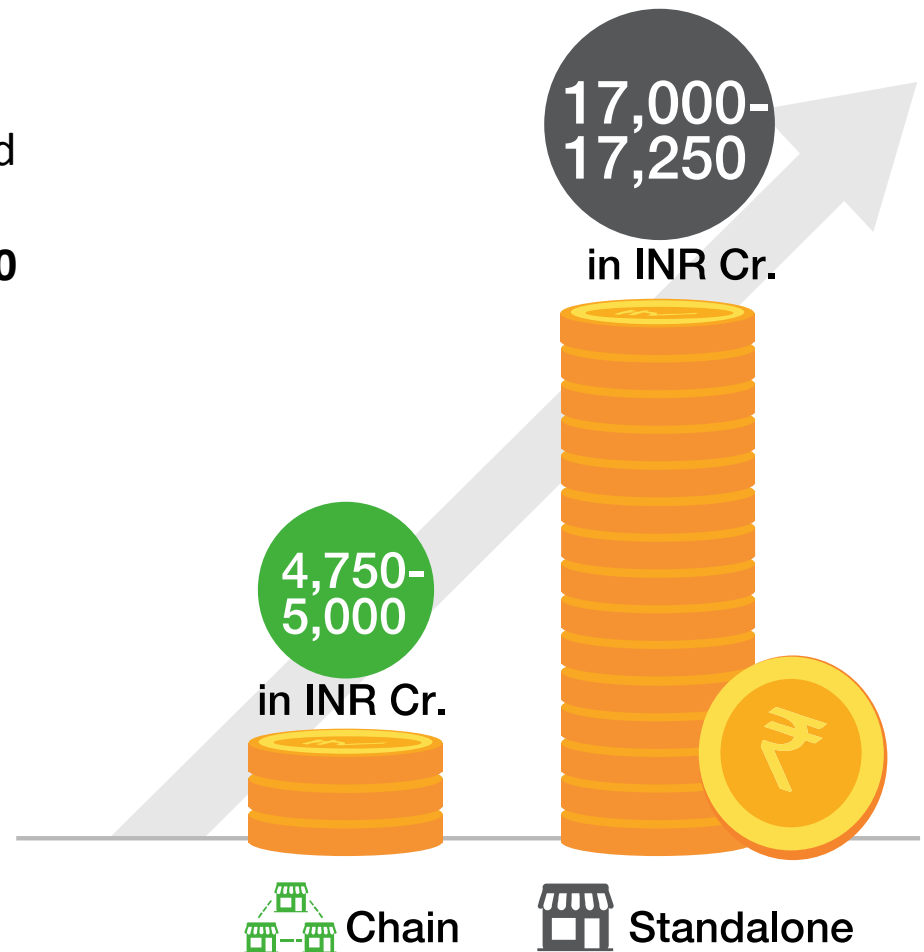


Source: [NRAI India Food Services Report 2016](#)

Contribution to the Government Exchequer



- The chain and licensed standalone segments will contribute an estimated **INR 22,000 - 24,000 Crores** in 2016, projected to double to **INR 42,000 - 45,000 Crores** by 2021.
- The government has the opportunity to generate additional collection of **INR 13,000 - 22,000 Crores** through closer monitoring of tax collection from the unorganised segment



Source: [NRAI India Food Services Report 2016](#)

Key Growth Drivers



Technology enabling disruption in business and operating models



Tech Savvy Consumer – Rise of Online/ Social Media, Food Websites, Mobile Applications, Mobile wallets



Increasing share of **delivery and take-away** models, with a focus on convenience



Evolving palate of Indian consumers, with new (both Indian and International) cuisines gaining market share

Source: [NRAI India Food Services Report 2016](#)

Key Emerging Trends



Emphasis on **Regional Indian Cuisines** and revival of old recipes



New locations coming up, including Food Hubs, Travel, Commercial Complexes Religious tourist cities, among others



Indian brands **increasing presence** overseas



Significant **interest from PE companies** in the Food Services eco-system

Source: [NRAI India Food Services Report 2016](#)

For Further Details, Contact



Prakul Kumar
Secretary General

 prakul.kumar@nrai.org  +91 8860640879



Jaspreet Kaur

Marketing & Communication Manager

 jaspreet.kaur@nrai.org  +91 9582200025

National Restaurant Association of India

4th Floor, Phase- II, PHD House, 4/2 Siri Institutional Area,
August Kranti Marg, New Delhi-110016.

 +91 11 4100 0967  info@nrai.org

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